

DOCUMENT RESUME

ED 248 387

CE 039 718

AUTHOR MacKenzie, John R.
TITLE Organized Labor Education and Training Programs. Information Series No. 286.
INSTITUTION ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, Ohio.
SPONS AGENCY National Inst. of Education (ED), Washington, DC.
PUB DATE 84
CONTRACT 400-81-0035
NOTE 53p.
AVAILABLE FROM National Center Publications, National Center for Research in Vocational Education, 1960 Kenny Road, Columbus, OH 43210-1090 (Order No. IN 286).
PUB TYPE Information Analyses - ERIC Information Analysis Products (071) -- Reports - Research/Technical (143)
EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Adult Education; *Apprenticeships; *College Role; Community Colleges; Degrees (Academic); Government Role; *Labor Education; Labor Legislation; Labor Relations; Leaves of Absence; Postsecondary Education; Retraining; *Training Allowances; Trusts (Financial); *Tuition Grants; *Unions; Universities
IDENTIFIERS Labor Studies

ABSTRACT

This paper examines the role of organized labor in the United States in providing training and education for union members. The first section clarifies the purpose of the union as an institution by examining its roles, functions, characteristics, and legal frameworks. Domestic and international competition affecting unions and their relationship to business and industry are discussed. Labor education and training sponsored by trade unions are the main topics of the second section. The role of unions in providing apprenticeship training is described, emphasizing the importance of training trust funds for apprentices. Labor education is the training of union officers and members to fulfill their functions within the union and the larger society. In the third section, the role of educational institutions in providing labor education is outlined, delineating three stages of development of university labor education programs. The emerging role of community colleges is acknowledged. Four types of tuition aid programs are the subject of the fourth section: tuition advancement or reimbursement, educational leave, training funds, and scholarships and educational loans. This section includes information about barriers to worker participation and ways to overcome them. Case studies describing educational programs sponsored by unions conclude the monograph, illustrating the diversity of educational and training opportunities available to union members. (SK)

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ORGANIZED LABOR EDUCATION
AND TRAINING PROGRAMS

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1984

U.S. DEPARTMENT OF EDUCATION
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FUNDING INFORMATION

Project Title: ERIC Clearinghouse on Adult, Career, and Vocational Education

Contract Number: NIE-C-400-81-0035

Educational Act Under Which the Funds Were Administered: 41 USC 252 (15) and P.L. 92-318

Source of Contract: National Institute of Education
U.S. Department of Education
Washington, DC 20208

Contractor: The National Center for Research in Vocational Education
The Ohio State University
Columbus, Ohio 43210-1090

Executive Director: Robert E. Taylor

Project Director: Juliet V. Miller

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This publication was prepared with funding from the National Institute of Education, U.S. Department of Education, under Contract No. NIE-C-400-81-0035. The opinions expressed in this report do not necessarily reflect the position or policies of NIE or the Department of Education.



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FOREWORD

The Educational Resources Information Center Clearinghouse on Adult, Career, and Vocational Education (ERIC/ACVE) is one of 16 clearinghouses in a nationwide information system that is funded by the National Institute of Education. One of the functions of the Clearinghouse is to interpret the literature that is entered into the ERIC database. This paper is of particular interest to adult and career educators and to vocational guidance counselors.

John R. MacKenzie, Associate Professor of Labor Studies and Director of the Labor Studies Center at the University of the District of Columbia, prepared the paper. He previously served as Director of the Labor Studies Center at American University and Executive Director of the National Institute for Labor Education, Inc., a nonprofit national education and research corporation. Mr. MacKenzie has also been active in labor relations, having served as Director of the Illinois State Employees' Council and International Federation of State, County, and Municipal Employees of the American Federation of Labor-Congress of Industrial Organizations (AFL-CIO).

Recognition is also due to Robert Glover, Director of the Center for the Study of Human Resources, University of Texas at Austin; to Dorothy Shields, Director of Education, AFL-CIO; and to Roy Butler, Senior Research Specialist, and Robert Bhaerman, Research Specialist, the National Center for Research in Vocational Education, for their critical review of the manuscript prior to its final revision and publication. Roy Butler also commented on early drafts of the paper.

Susan Imel, Assistant Director at the ERIC Clearinghouse on Adult, Career, and Vocational Education, coordinated the publication's development with the assistance of Shelley Grieve and Sandra Kerka. Jean Messick typed the manuscript, and Janet Ray served as word processor operator. Editing was performed by Judy Balogh of the National Center's Editorial Services.

Robert E. Taylor
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EXECUTIVE SUMMARY

This paper examines the role of organized labor in the United States in providing training and education for trade union members. The first section is an overview of the trade union as an American institution. In order to clarify the purpose of the union as an institution, its roles, functions, characteristics, and legal frameworks are briefly discussed followed by an examination of the domestic and international competition that affects unions and their relationship to business and industry. Education ranks as a relatively low priority for most unions although union leaders view it as an important tool for helping carry out their essential functions.

Labor education and training in trade unions is the topic of the second section. The role of unions in providing apprenticeship training and labor education to train union officials is discussed. Since these two types of training help labor unions accomplish their essential functions, most union efforts are devoted to these areas of training and education. The importance of training trust funds in supporting apprenticeship training is emphasized.

In the third section, the role of educational institutions in providing labor education and training is outlined. Nearly 70 percent of all labor education is conducted by colleges and universities; therefore, the role of these institutions is highlighted. Three stages of the development of university labor education are delineated. Stage one, which lasted until the post-World War II era, was labor education as a form of adult and continuing education. Stage two emerged from the creation of industrial relations programs following the passage of the National Labor Relations Act in 1935 and the experiences gained under the War Labor Board during World War II. The third and current stage is the development of credit programs in labor studies. This stage is tied to the formal recognition by universities that there is a body of interdisciplinary knowledge surrounding the trade unions and their functions. The emerging role of community colleges in providing associate degree programs is also included in this section.

Tuition aid programs, an important negotiated benefit providing workers with access to educational opportunities, are the subject of the fourth section. Four types of tuition aid programs are described:

- o Tuition advancement or reimbursement plans
- o Educational leave and leave-of-absence plans
- o Training fund plans
- o Scholarship and educational loan plans

Because workers have not made extensive use of available tuition aid plans, information about barriers to participation is included. Three areas needing attention in order to improve worker participation rates are identified:

- o Information delivery. Employees need more information about the nature of tuition aid plans, available education programs, and eligible education and training institutions.
- o Counseling. Both career and personal counseling need to be made available to workers wishing to participate in educational programs.
- o Improved linkages between the work site and educational providers. Improved linkages can facilitate the delivery of educational and counseling services.

To demonstrate the diversity of education and training programs supported or sponsored by labor unions, case studies describing educational programs made possible through the efforts of labor unions conclude the monograph. These case studies are three retraining programs for dislocated workers, two training fund programs, and a university-sponsored weekend college bachelor's degree program. The six programs described are indicative of organized labor's interest in ensuring that workers have a variety of educational offerings available to them. Although not necessarily representative of educational programs developed by or in cooperation with organized labor, these programs meet a wide variety of education and training needs.

Information on labor education may be found in the ERIC system under the following descriptors and identifiers: Adult Education, *Apprenticeship; *College Role; Community Colleges; Degrees (Academic); Government Role; *Labor Education; Labor Legislation; Labor Relations; Leaves of Absence; Postsecondary Education; Retraining; *Training Allowances; Trusts (Financial); *Tuition Grants; *Unions; Universities; Labor Studies. (Asterisks indicate descriptors having particular relevance.)

INTRODUCTION

The trade union movement in the United States is a complex, decentralized institution involving National and international unions and employee associations whose jurisdictions often overlap. There are approximately 203 National and international unions and employee associations with a number of intermediate administrative bodies and about 63,721 local unions, each of which may or may not be involved in providing education and training to their members (U.S. Department of Labor 1979).

This paper discusses the topic of education and training in trade unions. It concentrates on the structural factors, both internal and external to the unions, that affect their education and training efforts. It includes a brief description of the role of unions in society, factors that influence unions and affect how they carry out their representative functions; types of training and education provided by trade unions; the role of universities and colleges, including a description of the types, content, and delivery methods of the education and training they contribute; and tuition aid programs. In order to demonstrate the diversity of union-supported or union-sponsored education and training, case studies are included.

Due to the scope and complexity of the organizations involved, all facets of union education and training cannot be covered adequately in a single monograph. Further, the topic of education and training in the unions has been the subject of few research efforts in recent years. The last definitive study, Labor Education in the U.S. (Rogin and Rachlin 1968), was published by the National Institute for Labor Education (NILE) under a grant from the U.S. Office of Education. Given these limitations, the purpose of this paper is to provide adult, career, and vocational educators basic information about organized labor education and training programs to increase their understanding of these activities.

THE TRADE UNION AS AN AMERICAN INSTITUTION

Prior to an examination of labor education and training in trade unions, a discussion of the trade union itself as an institution is important for two reasons. First, the trade union is one of the least known and understood institutions in society. Although the right of professionals to form associations to promote their interests (i.e., lawyers through the American Bar Association, bankers through the American Bankers Association) is rarely questioned, the need for workers to have similar associations (i.e., unions), is frequently misunderstood. Second, the trade union is often perceived as being in competition with the business and industrial community for the loyalty of American workers and in the selection and election of political candidates. As a result of this competition, unions are often viewed from a negative perspective. To clarify the purpose of the union as an institution, its roles, functions, characteristics, and legal framework are briefly discussed followed by an examination of the domestic and international competition that affects unions and their relationship to business and industry.

History of Trade Unions

As institutions in the United States, unions have a long history of attempting to represent the interests of the working man and woman. The oldest union in continuous existence in the United States is the Columbia Typographical Society (today known as Local 141 of the International Typographical Union, AFL-CIO), formed among the printers at the U.S. Government Printing Office in January of 1815.*

Trade unions were developed by workers as a means of protecting their interests in the workplace. They used collective bargaining as a means of making their voice heard by the employer. Early unions were craft unions, made up of journeymen and apprentices practicing a particular trade. In many respects, early craft union workers or journeymen differed little from the owners or master workmen. They did not have written contracts. Like the master craftsmen, they were concerned about the skill level and the quality of the workmanship of all the members of the craft, the selection of apprentices or trainees, the terms of apprenticeship, the number of apprentices, and the price of items produced.

Eli Whitney, who first introduced use of interchangeable parts in the manufacture of small arms, is credited with the growth of the factory system.

*There were successful unions founded prior to the Revolutionary War, but these did not last beyond the next depression or economic downturn.

His process permitted unskilled or semiskilled workers to learn one or a few jobs quickly, thereby replacing the skilled worker who had, in the past, made the entire product (Pelling 1960). The rapid growth of manufacturing during and after the Civil War required an increasingly greater number of new workers, many of whom immigrated to this country from Europe. The craft unions of those early days were concerned only with the organization of skilled workers of their own crafts and thought very little about the increasing number of unskilled and semiskilled workers in manufacturing. (There were major exceptions to this practice including the United Mine Workers union and the International Ladies Garment Workers union, which were organized on an industry-wide basis.) The unions that composed the American Federation of Labor (AFL), formed in 1881, were essentially craft unions.

Early attempts at industrial organization in the mass production industries by such groups as the Knights of Labour and the Industrial Workers of the World (IWW) did not survive the frequent economic boom and bust cycles or the opposition of employers. Besides the obstacles of the craft workers' versus industrial workers' form of organization and economic cycles, unions also had to overcome the lack of class solidarity found in the United States in comparison to Europe. Without this solidarity, keeping unions together during the boom and bust cycles was all but impossible. This lack of working-class identification made it difficult for unions to organize U.S. workers. The large number of immigrants speaking many languages further complicated the unions' attempt at the organization of workers.

The third, and perhaps most important, reason for the failure to organize was the opposition of the courts to the formation of trade unions. In most countries, the government can be characterized as the friend or foe of trade unions. In the United States, it was the court that more often than not, in the name of protecting property rights, sided with the employer.

Unions had always faced a hostile climate in business and industry. Even more significant was the opposition they faced in the Federal and State courts. Courts easily--often too easily--issued injunctions against workers on request by employers during the workers' attempts to form a union, organize a firm or industry, or strike due to the employer's refusal to recognize the union. Fairbairn (1956), in The Practice of Unionism, summarizes the situation: "It was only through the wholesale intervention of government in its behalf that unionism could overcome the crippling disabilities [of] an antagonistic environment" (p. 9).

The Federal Government entered the labor relations process for the first time with the passage of the Railway Labor Act in 1926. In 1932, the passage of the Norris-LaGuardia Act severely limited the power of the Federal courts to issue injunctions in labor disputes and made the "yellow dog contract" unenforceable in the Federal courts. This allowed unions and employers to compete for the loyalty of workers without court interference.

Under the presidency of Franklin D. Roosevelt and the New Deal, unions began a period of growth and prosperity in the United States. During Roosevelt's administration, unions began massive organization drives. Drives by the Mine Workers, Garment Workers, and Clothing Workers made great strides by

organizing workers according to industries. Unions were spurred on by section 7a of the 1933 National Industrial Recovery Act (NIRA), which declared that workers had "a right to organize and bargain collectively through representatives of their own choosing" (ibid., p. 160).

Although the U.S. Supreme Court declared the National Industrial Recovery Act unconstitutional, the Congress passed the National Labor Relations Act (NLRA), or Wagner Act, in 1935. Upheld by the U.S. Supreme Court in 1937, this act affected the vast majority of businesses and industries by equalizing the disparity of power between unions and management. It permitted the workers the right to organize and to select representatives of their own choosing through petition and government-conducted, secret ballot elections. The Government determined which workers were to organize through unit determination, and it established a code of fair conduct to deter unfair labor practices by management. These were necessary to a free election. If the workers voted to organize, the law provided that management had to bargain in "good faith" with the workers and their unions on wages, hours, and working conditions. However, owners and managers did not have to agree to any union requests for improvements. The National Labor Relations Act sought to provide a way in which workers could express their will on recognition issues instead of having to go on strike merely to get the employer to sit down and discuss the workers' concerns.

Following the passage of the NLRA, the unions began to organize the major industrial firms, and the trade union movement rose to 14 million members after the close of World War II (Pelling 1960). Unions represented approximately 17 million workers in 1965, or 28.5 percent of the work force (Bok and Dunlop 1970). This was a high point of union organization in the United States in percentage of workers organized. As of 1980, trade union organizations represented 24.4 percent of the work force in the United States (American Federation of Labor 1980). The U.S. has the lowest level worldwide of trade union organizations as a percentage of the work force, calling into serious question the much-discussed issue of union power.

As of 1984, unions represent approximately 22 percent of the U.S. work force, or about 23.5 million people who are either union members or represented by unions. The National American Federation of Labor-Congress of Industrial Organizations (AFL-CIO), formed in 1955, is the largest organization with which unions associate. It represents approximately 13.8 million members through the 95 National and international unions affiliated with it (American Federation of Labor 1984). Other major nonaffiliated National unions are the Teamsters with approximately 2.3 million members and the National Education Association with about 1.7 million members. The remaining unions are small organizations, many of which represent government or civil service employees at the State and local levels. Often, unions also represent unorganized workers indirectly by setting standards for pay, benefits, and working conditions.

The majority of the organized workers in the private sector today are in manufacturing (6.7 million), construction (1.6 million), and transportation and communications (2.9 million). The government sector has been the fastest

growing segment of the labor movement and represents 4.5 million workers. This number includes 2.8 million workers in education (Gifford 1983).

Current Functions

The 203 National and international unions, with their over 60,000 local unions, are primarily responsible for representing the workers' economic interests through collective bargaining. The AFL-CIO and its 51 State central bodies (including the Commonwealth of Puerto Rico) and 725 locals (or geographic central bodies) are primarily responsible for coordinating organized labor's political, legislative, and community programs. An examination of the present departments and major committees of the National AFL-CIO reveals the scope of its range of interest. A partial listing of these would include COPE (Committee on Political Education), Legislation, Education, Community Services, Civil Rights, Social Security, Occupational Health and Safety, International Affairs, Organization and Field Services, Housing, and Research (American Federation of Labor 1984).

In addition, the AFL-CIO has membership departments that are composed of unions in a like field. These include the Building and Construction Trades Department, Maritime Department, Industrial Union Department, Food and Allied Service Trades Department, and Public Employee Department. These departments provide a basis for unions in similar fields or industries to exchange ideas and develop policy. Many of the AFL-CIO membership departments carry out formal research and education functions for the international unions that constitute their membership, as do certain of the major departments or committees previously mentioned.

The international unions themselves may carry on some or almost all of the functions of the AFL-CIO, depending upon their size and resources.

Union Functions, Priorities, and Government Regulation

In order to understand trade unions, it is important to examine not only what they do, but also the priority in which the National and international unions perform their functions. To provide a somewhat clearer understanding of how a union works, a brief examination of two important features that affect the trade union may be useful.

The first is the legal environment that surrounds much of what a union can do to represent its members. The laws governing the unions' representative function affect the way in which unions can represent their members. In addition to the National Labor Relations Act, these laws include those that govern the workplace, such as the Occupational Safety and Health Act (OSHA), the Employees Retirement Income Security Act (ERISA), and the Equal Employment Opportunity Act (EEOA).

The second feature of trade union's operation is the election process whereby top leadership is chosen through a series of open and free elections conducted at the local and National union levels. These elections, held under

the Landrum-Griffin Act, are monitored by the U.S. Department of Labor to ensure that democratic procedures are stringently followed. This process moderates union decision making, as leaders must be assured that they have a majority supporting their positions (or at least not opposing them) prior to taking action. In addition, authority for actions by union leaders must be based on union constitutions and bylaws, convention resolutions, votes at local union meetings, or a majority vote of their executive boards. Otherwise, union leadership may expose itself to political criticism or Government intervention.

The following breakdown of the unions' major functions and the notes on the extent of regulation or review for each function outline the extent of outside legal involvement in the union's basic activities. Table 1 presents the 10 primary functions (in approximate order of priority as determined by this author) of National and international unions, their intermediate bodies, and affiliated local unions. Although priorities may change from union to union, the functions comprising the list will be essentially the same. For example, if priorities for the AFL-CIO and its subordinate state and local central bodies were to be listed, the labor relations-collective bargaining functions would be either at the bottom of the list or not listed at all, and international activities would be included as a primary function.

Table 1 illustrates the important functions union leaders must carry out. It is not coincidental that the areas of greatest concern, which affect both the members' job security and economic betterment, are also the areas of greatest regulation by external bodies. Since education is seen as a vehicle for assisting union members to carry out these functions, trade union education programs tend to be requested on the basis of priority functions and the problems union leaders are having with them. Therefore, the majority of educational programming will generally take place in the following areas (beginning with the highest priority): labor relations (functions one and two), administrative activities (function six), and political action activities (function four).

Since the other top priorities--strikes, legislative activities, and organizing the unorganized--are almost always carried out by specialists, they do not require educational programs. For example, trade unions offer very little training related to conducting strikes, and universities and colleges offer none. This is primarily due to the fact that the vast majority of collective bargaining efforts between unions and employers are successfully concluded without work stoppages, and consequently very few workdays are lost because of strikes. If strikes take place, they are conducted by specialists who have the proper understanding of law, customs, and protections pertaining to them. Legislative activity, with the exception of letter writing, is usually carried on by specialists at the AFL-CIO and international union level and by the top officials of the union organizations at the National level. The officers of State and local central bodies conduct much of the lobbying on behalf of the labor movement at the State level or at the city and county levels. However, educational programs may be conducted by the State and local central bodies at summer schools or local and regional schools so that local union leaders and the rank and file will have knowledge of unions' legislative initiatives. Finally, the training of union organizers is usually a union

TABLE 1
PRIMARY FUNCTIONS OF LABOR UNIONS

Functions	Government or Legal Control or Review
Collective bargaining	Parameters for collective bargaining in the private sector are set by the National Labor Relations Act (NLRA). Items for bargaining should come within the permitted categories: wages, hours, and working conditions. In the public sector the scope of bargaining is usually carefully fixed by Federal or State law or by city or county ordinance.
Contract administration and arbitration	Courts may review how unions handle grievances to be sure that the workers have been fairly represented. The courts will support arbitrators' decisions with few exceptions.
Strikes	Strikes are considered free speech by courts; workers who strike for economic reasons are protected.
Political action	Union activity must conform to several Federal laws (i.e., they are regulated by the Federal Election Commission) as well as State laws.
Legislative activity	There are a minimum of laws and regulations governing legislative activity but many States require that legislative activity be registered.
Union administration	In legal terms, this area is one of the most strictly controlled. The Federal Landrum-Griffin Act controls union nomination and elections and how unions can spend their funds. The U.S. Department of Labor's Labor-Management Services Administration oversees elections, and it has the power to have an election set aside if it considers the electoral process unfair. Unions must also report yearly on their financial activities.
Research activities	There are no laws or regulations governing this activity nor is it subject to review.
Organization of the unorganized	This activity is regulated by NLRA and the National Labor Relations Board in the private sector. In the public sector, the laws of the States or local community apply.
Education*	Except for the area of apprenticeship, there are no laws or regulations governing this activity nor is it subject to review.
Community activity	There are no laws or regulations governing this activity nor is it subject to review.

*In craft unions the education function would move up to the fourth or fifth position as apprentice training, journeyworker upgrading, and other forms of training are bread-and-butter issues.

function, not one in which university and college programs participate except for providing information on the laws that govern the organization process.

There will be more detailed discussion of educational programming in later sections of this paper. At this point, it can be noted that education and training in trade unions follow relatively closely the unions' primary functions, including those that have the highest degree of regulation or control.

Education and training in trade unions, except for apprenticeship, are somewhat lower in order of priorities and in a sense have fewer legal or political consequences in the short run. Therefore, education and training are provided by trade unions commensurate with their priorities and their financial ability to offer them. On the other hand, each function of a union has its own cost, and representative priorities are often determined by a union's ability to meet the costs.

The unions' major source of income is member dues as determined by members themselves through convention action or by secret ballot at local district or regional meetings. In most unions, raises in dues are not accepted easily so unions cannot go back to that "well" very often. When they do, it must be for good reason.

Trade unions in the United States have not been able to educate their members adequately and probably never will without a massive infusion of outside funds. If the European, Canadian, or similar models are taken as guides, the Federal Government would seem the most likely source of outside funds for education of union members.

Unions and International and Domestic Competition

Trade unions in the last few years would describe themselves as being "under siege" from events that are in large measure beyond their control. Key elements in the competition between unions and business and industry are rooted in both foreign and domestic competition.

U.S. firms today face outside competitive pressures from low-wage-paying overseas producers (often U.S.-owned subsidiary companies) or foreign governments who "dump" their products in the U.S. market at a price well below cost. Although the current U.S. administration is committed to a free market, most major industrial and third world nations protect their own domestic markets through trade restrictions that hinder U.S. producers. Foreign governments may also become partners with their domestic producers, giving them an edge that U.S. manufacturers do not have. The current U.S. dollar provides another stumbling block to U.S. traders. The value of the dollar is so high that, even when international markets are open to them, U.S. producers cannot sell their products in world competition.

There are no easy means of alleviating these pressures. As a reaction, American employers in many industries with collective bargaining agreements have asked their unions to settle for less at the bargaining table, to accept cuts in current wages or fringe benefits, or to adjust work rules in ways

favorable to the employer. These concessions lower the standard of living among workers and cause discontent.

The unions in other heavily organized industries, such as transportation, are facing increased domestic competition due to the Federal Government's movement toward deregulation. Whether the trend toward deregulation will, in the long run, work to the benefit of U.S. companies, their workers, and consumers is not known. But it is safe to say that it has caused short-term upheaval for a number of previously strong, competitive companies--forcing some into bankruptcy and others into various types of reorganization. Once again, external circumstances have caused unions to face reduced economic vigor in their industry, and have ultimately lowered standards of living for their members.

Trade unions have had other problems on the domestic front as well. Traditional areas of union strength, such as the smokestack industries and fabrication and assembly plants, have experienced no growth or have been losing ground.

Certain industries, such as steel, automobile, and electronics--where unions were a strong vital force in the domestic market--have not kept up with technological advances. These industries also cut back production during the recession of 1982-83, seriously affecting both the United States and its major trading parties.

The price of money itself in the domestic U.S. market also adversely affects industries such as home building. This, in turn, adversely affects unions such as those representing workers in building and construction trades, whose 3.5 million members do much of the home building.

These domestic or foreign market conditions have also caused both heavy industry and construction unions to put off training programs, particularly in the apprenticeable or highly skilled trades. The number of apprentices varies considerably from craft to craft in good times, but in periods of recession, most crafts (whether those of electricians, machinists, sheet metal workers, carpenters, or operating engineers) cannot take in apprentices without work in their field to provide on-the-job training, an essential component of apprenticeship.

In the government sector, the unions have made major organizing and collective bargaining gains in recent years. But these trade unions are a part of the total economic system of their communities, which have faced an eroding tax base due to plant closings, unemployment, a reduction in two-family incomes, and movements that reduced local taxes. Such cutbacks have prevented the affected States and their subdivisions from purchasing needed goods and services and repairing their infrastructures. This, in turn, further depresses local and National markets.

The foregoing discussion serves to emphasize that trade unions do not exist alone in our society and that they, perhaps more than other institutions, feel the immediate impact of changes in economic conditions. Union education and training programs reflect, in some measure, the labor market in which their industries operate.

LABOR EDUCATION AND TRAINING IN TRADE UNIONS

Trade union organizations have, through the years, developed or engaged in four types of training programs. These are as follows:

- o Apprenticeship training is the training of skilled workers.
- o Labor education is the training of trade union officers and members to carry out their institutional and professional functions.
- o Vocational education is primarily short-term skill-building programs to train or upgrade workers in craft and other unions.
- o Self-improvement education may include such areas as citizenship education, high school equivalency classes, language or math skill improvement, or cultural programs.

Of course, there is overlap between the four general categories. Self-improvement training in math can be found in vocational and apprenticeship programs and occasionally in labor education. Similarly, there are aspects of vocational training in apprenticeship training and more particularly in journeyworkers upgrading and training. Nonetheless, each category is sufficiently distinct to describe it as a separate group of programs.

This chapter will discuss apprenticeship training and labor education since most union efforts are devoted to these two areas. It will focus on the role of unions in providing these programs whereas the following chapter will focus on the role of educational institutions.

Apprenticeship Training

Apprenticeship training is the oldest of the four areas of formal training in which trade union organizations have been involved. The first apprenticeship training was probably developed to train stone masons to build King Solomon's Temple and the pyramids of Egypt. The system of training became formalized over time and was later enforced by government regulations. For example, beginning in 1532, lawmakers in Elizabethan England passed the Statutes of Artificers that were enforced through a system of craft guilds in many countries in Europe. It was not until 1937, with the passage of the Fitzgerald Act, that the U.S. Government began regulating apprenticeship training. The craftsmen who came from England or other European countries where they had been receiving 2 shillings or less per day could expect to double their wages in the American colonies (Morris 1976). During and immediately after the colonial days, this Nation depended on two sources for its

skilled workers. The more important source was craftsmen from Europe, and the second source was those who were trained in this country.

Apprenticeship training today is a system that develops skilled workers through a supervised and rationalized process of on-the-job training and classroom instruction. The apprentice on-the-job training requirement may be 2,000 or less hours per year of supervised work in which the apprentice works with journeymen individually or in a small group. The on-the-job training is usually supplemented by 144 hours of classroom training. The term of apprenticeship ranges from 1 to 10 years depending on the craft or industry, although most trades average 3 to 4 years. The training begins at a fundamental level and becomes more difficult as the apprentice progresses through the program.

Some well-known unions with the longest histories of apprenticeship are in highly organized industries such as the printing trades, railroads, building and construction trades, machine tool, and glass making. In many industries with apprenticeship programs, the employers and the unions cooperate in developing, funding, and administering the programs to be sure that the skill levels are maintained. In other industries, the firm controls the apprenticeship training program and facilities, with the unions playing a more secondary role. Although a joint apprenticeship committee, composed of equal representation from the employer and the union, administers apprenticeship training in unionized industries, the union frequently exercises primary control over it. However, 85 percent of apprenticeship programs registered with the Department of Labor are sponsored solely by employers, that is, there is no union participation.

Apprentice training in the unionized trades has historically been the training of the young--those individuals 18-26 years old. Age exceptions were made for veterans and for organized nonunion craftworkers who had some job experience but no formal apprentice training. However, most unions--especially those in the area of manufacturing--are lifting age restrictions. Training is open on a competitive basis to all who wish to apply who meet the craft's basic criteria and who are able to pass objective tests. In some years, the number of apprentices selected is limited based on union and management projections of future work for the particular craft.

After apprentices have completed their training, they are awarded journeyworkers certificates that will be accepted as proof of their skill level throughout the United States, Canada, and much of the rest of the world. In some crafts, such as plumbing, the apprentice must pass both a written test and skills demonstration prior to being accepted as journeymen. The apprenticeship training helps ensure that there will be a skilled work force.

When the apprentice programs are controlled by industry, they are usually handled by management. Large firms may have their own apprentice training programs. Alternately, they may provide an educational fringe benefit for their employees that permits individuals to become skilled craftworkers on their own time through enrollment in a community college or private program. Sometimes unions become involved in negotiating these educational benefits. For instance, the United Auto Workers (UAW) has negotiated a \$500 per year

fringe benefit with the General Motors Corporation for UAW members enrolled in a certified craft program (Levine and Hutcon 1980). This type of cooperation between union and management upgrades the skills of the work force and results in improved productivity. It also improves the financial positions and job possibilities of trained workers.

The Federal Government, through its Bureau of Apprenticeship and Training in the U.S. Department of Labor, works to establish apprenticeship training programs with management and labor. The Bureau has field staff in various regions of the country to work with the apprentice programs and assist in establishing standards. The standards ensure that once apprentices complete their training, they can realistically expect to be adequately trained journeymenworkers in the field of their choice. The standards are published by the U.S. Department of Labor. (For examples of National apprenticeship and training standards, see U.S. Department of Labor 1982a, 1982b, and 1982c.)

After the Revolutionary War, the wages of skilled workers in the United States were 75 to 100 percent more than the unskilled (Pressen 1976). Today, there is a similar range between the wages of the skilled and those of the unskilled. During the training period, the starting salary for an apprentice is often less than he or she could make in an unskilled or semiskilled occupation, but as the skill level of the apprentice improves, so does the pay.

Like other forms of education and training, apprenticeship training is going through a variety of changes. It is expanding into many fields such as medical technology and computer-related occupations. As science and technology expand, so does the knowledge required of the worker in the field. Occupational groups that have been considered semiskilled and whose workers have traditionally been trained through on-the-job training are finding that job expansion now requires more formal and sophisticated training. Frequently, the training becomes so complex that it requires an apprenticeship.

Training Trust Funds

Funding has always been a critical issue in providing training for work force preparation and updating. There have never been sufficient funds to do all the training that needs to be done. This funding shortage will be even more apparent in the future, when more training than ever will be needed. Therefore, more attention must be focused on alternative ways of deriving funds for union-affiliated training programs.

Through the collective bargaining process, labor and management have established different kinds of funds for education and training. The most prominent today are tuition aid funds and training trust funds. Because of their importance in supporting apprenticeship training, training trust funds are discussed here. Tuition aid funds are treated in another section.

The joint training trust funds provide support for educational programs designed for specific industries. Such funds have existed at the local level for many years. The local training trust funds are largely used to support apprenticeship training and journeyworker upgrading programs. Also, labor and

management have jointly agreed to establish National training trust funds in such industries as sheet metal, plumbing, painting and decorating, insulation, and masonry. Unlike tuition aid funds, workers aggressively pursue learning opportunities provided through National joint labor-management training trust funds. No research can be found on why workers' behavior is different in this case, but the following factors may contribute to the high level of participation in training trust fund programs:

- o The purpose for which the funds were established
- o The learning opportunities made available through the funds
- o The strong involvement of both labor and management in the operation of the funds

Purposes of training trust funds. Most of the joint training trust funds (both local and National) are established through joint labor union and management agreement to improve training, productivity, and employment. A mutual benefit is made possible through the funds' activities. Labor union members increase the possibility of maintaining full-time employment, and employers can successfully compete for a broader range of contracts because their workers possess up-to-date knowledge and skills.

Money from the National training funds is frequently used for such activities as conducting research, developing training and curriculum materials (e.g., apprentice and journeyworker workbooks, instructor's guides, transparencies, films), and providing training programs for apprentice coordinators, union members, and joint apprenticeship committee instructors of apprentices and journeyworkers. These activities may be conducted by the administrative staff hired by the funds' trustees or may be handled through cooperative contractual agreement with either public or private agencies.

Two of the National training funds, for example, have maintained a long-standing contractual relationship with major universities. The National Training Fund for the Sheet Metal and Air Conditioning Industry has contracted with the National Center for Research in Vocational Education at The Ohio State University continuously since 1973 for a variety of services. These services have included conducting several industry studies, collecting and cataloging relevant sheet metal industry materials and resources, and training nearly 2,000 instructors and 800 local members of joint apprenticeship and training committees throughout the United States and parts of Canada. These activities are only available to those designated by the funds' trustees. The trustees for this fund come from the following associations: Sheet Metal Workers' International Association (SMWIA) and the Sheet Metal and Air Conditioning Contractors' National Association (SMACNA).

The National Center for Research in Vocational Education has also worked with the National joint labor-management training trust fund for the painting, decorating, and drywall industry, and the National joint labor-management trust fund for the insulation and asbestos industry to develop apprentice workbooks, instructor's manuals, and visual aids and to conduct instructor training programs targeted specifically to the needs of these two industries.

Both of these two contractual relationships have extended over the past 5 to 6 years.

Purdue University has worked contractually with the United Association (UA) of Journeymen and Apprentices of the Plumbing and Pipefitting Industry to train instructors of apprentices, administrators, and others designated by the UA. This program has operated on a continuing basis since 1953--the longest of any in existence.

Glover (1980) has indicated that "perhaps some of the best apprenticeship instructor training is being conducted at Purdue University and Ohio State University under contracts with various national industry apprenticeship training trust funds" (p. 12).

Labor Education and Labor Studies

Labor Education

Labor education, or workers' education as it is more commonly called outside the United States, has been considered a part of the general field of adult education. It covers a number of areas: worker's institutions; the union and its function; the worker's responsibilities to the institution, the State, the Nation, and the world; and the problems that arise from the workplace and the laws and customs that govern it.

Labor education may be distinguished from the general field of adult education. As Rogin and Rachlin (1968) point out, "Labor education is distinguished from general adult education because it attempts to reach workers through their union by integrating them in education because they are unionists and workers rather than individuals" (p. 11). This ability to reach large numbers of workers, especially blue-collar workers, has only been accomplished by going through the worker's institution, the trade union. University labor education centers reach the workers with their labor education programs in the same way. However, the potential outside provider of labor education must be acceptable to the trade union as well as have the ability to put on the desired programs.

The word "acceptable" may have many connotations, but based on this author's years of experience, it does not mean that the postsecondary institutional provider of education and training must agree with the union's policies or actions. Rather, it means that the union's institutional integrity must be respected and its policies noted, if relevant to the subject matter being taught; that the union's primary functions, specifically collective bargaining, are understood; and that the instructors can relate to adult union members, can teach adults, and are knowledgeable in their subject matter.

Universities have been able to work with unions within their States by establishing labor advisory boards that counsel them and their labor center. These boards may be composed of union representatives alone, or they may be joint union and university efforts and may include a representative from the AFL-CIO Education Department as a member. The union representatives on the

advisory boards are usually the top-ranking collective bargaining officials in the State or region. The committee is usually chaired by the president of the State AFL-CIO (or local central body as in the case of a community college) who, in theory, represents the entire union movement. This, however, does not preclude non-AFL-CIO union leaders from serving on the advisory board. The university labor center must be sure it attempts to serve all major union groups within the State. Therefore, non-AFL-CIO union representatives, such as representatives of the National Education Association (NEA), the Teamsters, the United Mine Workers, or State or local public employee associations, are welcome.

The advisory board is normally attached to the university, and the president may do the appointing for a term of 2 or 3 years. Replacements may be made on the basis of position, influence, or occasional rotation.

The advisory boards usually meet once or twice a year and may or may not have an executive committee that meets more often. The function of these boards may vary, but they usually provide advice and counsel to the labor center and the university on the educational needs of workers in their States. In addition, they may assist with the setting of educational priorities for the labor center and with obtaining support for its programs. The University and College Labor Education Association, the National professional association for university and college labor education, suggests minimum standards necessary for the establishment of an acceptable university or college program. The standards include the following:

- o The postsecondary institution must have a representative labor advisory committee that is established in consultation with the union organizations themselves.
- o So that workers may be able to locate it, the labor education program must be an identifiable unit within the university with a sufficient budget to carry out its programs, including travel, and it must have sufficient authority and administrative flexibility to plan and develop its budget and programs, and to hire teaching personnel, who are qualified and who can relate to adult workers.
- o The programs should be chaired by a recognized labor education professional.

Rogin (1970) defines labor education as follows:

Labor education is the attempt to meet worker's educational needs as they arise from the participation in unions. It is education directed toward action. Its programs are intended to enable workers to function more effectively as unionists, to help them to understand society and fulfill their obligations as citizens, and promote individual development. It does not include training in job skills for the labor market, commonly known as vocational education. (pp. 301-302)

This definition will generally hold today if a somewhat greater stress is placed on international understanding. As noted previously, trade unions

today are buffeted by new problems and new issues, such as foreign trade and international market competition. These issues will be topics of labor education in the future.

Labor Studies Credit and Degree Programs

What has been omitted from this definition, other than new directions in the field of labor education, is the addition of labor studies. Labor studies is the generally accepted university and college term that distinguishes credit and degree programs from labor education programs. There were no known degree programs in existence in 1965-66, the base years of the last definitive study (Rogin and Rachlin 1968). This means that this new addition to the education and training functions of trade unions has not been integrated into the larger picture. There has not been a definitive study of credit and degree programs in the new field, nor has there been a study that has reviewed both labor education and labor studies together. We do not know the impact of labor studies on labor education. Have labor studies, for instance, diminished or increased labor education or have they added more depth or new knowledge to the labor education programs? Do labor studies degree programs have certain similarities and differences, and why? Most of this is not known from a National perspective, so what will follow on labor studies is based, in part, on the author's knowledge and may be subject to his bias.

Labor studies have developed out of several needs coming together in a short time span. Credit and degree programs have grown with similarities and differences based, in part, on the needs of the workers as defined by their organization, trade union, industry, and work force mix within the State and as the universities, colleges, and their faculties understood them.

The first two degree programs at the University of Massachusetts-Amherst and at Rutgers, The State University of New Jersey, began at approximately the same time in 1967 as professional degree programs at the master's level. The University of Massachusetts degree was in labor studies and the Rutgers degree was in education, reflecting its location in the College of Education. Both degrees were generally aimed at training professionals for trade unions; for State, local, and Federal Government positions; and, to a lesser degree, for private industry. Both of these programs began at about the same time that the major public organization drives and State laws were passed to permit collective bargaining by State and local government employees. These had been preceded by President John F. Kennedy's Executive Order 10988, issued in 1962, that permitted various forms of Federal employee union recognition together with a very limited scope of "bargaining."

This opened the way for trained personnel in trade unions and in government agencies at all levels who could provide assistance in the various new jobs or expanded jobs that were developed in labor relations, such as those created by the establishment of State and local public employee relations boards (PERBs). These new boards usually handled problems of union elections, recognition, mediation, fact finding, arbitration, and general issues on the scope of bargaining. Trained personnel were required on the part of the union

as well as in public employment, as each had little or no collective bargaining experience. Therefore, the hiring of university-trained students who were often older, who had been in the work force previously, and who were (more often than not) prounion or procollective bargaining was very beneficial to certain unions and public agencies.

A second major factor that affected the growth of labor studies was labor education itself. Labor education, as it originally developed, consisted of short-term courses aimed at meeting the specific needs of trade union organizations and their officers and members. Needs were met on an ad hoc basis, such as training new stewards at one location, training officers in parliamentary procedures at another, or developing a 2-day conference on a single topic, such as understanding the impact of economics on collective bargaining. These programs gradually grew until many unionists had completed the short courses sponsored by their unions or sponsored jointly with the university labor education centers. They now wanted and needed more sophisticated educational offerings, tying their educational program more closely to the liberal and social science disciplines.

University labor education centers, due to their advisory committees and their own professional labor educators, began to develop long-term programs. Although there was some uniformity, there were many differences between the course content of the short-term courses and long-term university programs. Some universities, such as The Ohio State University, pursued "a go-it-alone" philosophy and developed their own long-term programs. Others such as Rutgers, Pennsylvania State University, and West Virginia University joined forces under the Union Leadership Academy (ULA) and jointly developed curriculum for a long-term program. This program began in the early 1960s and continues today.

The ULA developed a series of short courses that could be taken individually or as a series, with a special certificate offered for the latter. These included such labor and liberal arts courses as Labor and the Economic System, Labor and the Political System, Labor and the Social System, Labor History, Labor Law, Psychology of Union Leadership, and Current and Future Problems. These courses often were preceded by short units on how to study and use the dictionary and were enriched by a day-long winter conference and a 2- to 3-day spring conference that also served as graduation exercise for those who had completed the entire course offering. These conferences were occasionally held in Washington, D.C.

A third factor was also present: the increase in the educational level of the work force. Workers had been completing high school with greater regularity and the educational level had reached 12 years in many areas of the country. Workers were brought to the State university door, and they, like other societal groups, began to open it for themselves.

Workers also began to change their past perception about education. They began to return to school in order to take courses related to their job or their union positions. Often they discovered educational opportunities that would allow them to move into new and nonrelated fields of work and into solid middle-class jobs.

The last major factor was the increase in the availability of credit education for the workers. Prior to 1960, very little credit education was available due to three factors. The first factor was the cost of education, particularly private education. Cost was usually a prohibiting factor to the vast majority of workers. The second factor was the location of the public colleges and the State university in particular. For political reasons, colleges and universities were often located in the middle of the State or, in the case of the land grant colleges, in the farm belt away from the population centers. Finally, universities and colleges did not cater to adults, but catered to the 18- to 22-year old residential student.

During the 1960s, the community college movement took hold and 2-year institutions began springing up in major cities and counties. Many universities began to establish branch campuses throughout the State to serve as feeders to central universities and to provide for the needs of more citizens. A third supplier, the teachers college, had also been going through changes. In the past, these postsecondary institutions had been more or less restricted to the education and training of public school teachers and administrators. They now broadened their bases by offering bachelor's degrees in areas other than education and degrees at the master's level. These institutions were closer to the population centers, spread out within the State, and therefore, closer to workers. These changes made education more available to workers. They could work, return home, clean up, and take a class or two at night or on weekends. Thus the community college movement opened the door to higher education for many workers.

Many universities view the student in labor education and the student in labor studies as distinct. Today, more than ever before, the labor education student is becoming the academic student at the community college, the 4-year college, and the university. Labor education, in part, becomes a "feeder" for labor studies and other academic programs. The academic labor studies students and the noncredit labor education students are in large measure distinct groups, but they may share an interest in the trade union and its many functions. In labor studies, the student will be subject to studying the union as an institution from the many perspectives of the social sciences and will attempt to integrate the knowledge provided by each into the whole. The student will link the institution of the trade union with a broader understanding of society. Thus, the student will also become involved in academic research and will study the research of others.

Labor Education Programs

The major concern of the labor education student, who is a union member, officer, or appointed staff member, is the institution and how it functions. This individual must be concerned with the job, the union, the problems he or she faces as a union officer or staff member, and problems the union and the industry face, as well as the laws that govern both. The universities and colleges have developed labor education courses based on a half century of experience and on labor education research supplied both by the universities and by the trade unions. Labor education, as Gray (1966) points out, has divided itself into five general categories. These are--

- o ideological--based on commitment to social change,
- o institutional--designed to build organizational loyalty and participation,
- o professional--preparing individuals for leadership,
- o remedial--raising the level of the educationally disadvantaged, and
- o cultural--for life's enjoyment.

All of these categories were a part of labor education, but the two that are now the most characteristic of labor education are the institutional and the professional categories. The trade union is more concerned with the former because once groups of workers are organized, they must become unionized, which translates into members understanding their union, its functions, the laws governing it, the worker's obligations to the union as distinct from his or her employer, and the building of a loyalty to that union.

In the professional category, the union plays the major role in training trade union leaders through programs of labor education or labor studies. Although the university would feel comfortable in explaining the union, its functions, and the worker's general obligations, building loyalty to a union and its policies or to individual leaders would not normally be done by a university. However, the training of trade union officers at all levels to carry out their trade union function would be well within the university's functions. In fact, with the increased complexity required of trade union leaders to carry out the functions of their office, the university may be better able to provide this function due to its academic resources. However, the occasional bias against the union on the part of academic institutions has inhibited research about the union. When studies have been done, the lack of a system to deliver research results to workers and their leaders has caused new information to remain on the shelves.

Labor education essentially uses adult education program delivery models--the short course, conference, seminar, and workshop--for its work. The programs are first jointly planned with the trade union organization (or by trade union National unions with their locals), packaged, and brought to where the workers live and work. They are scheduled at a time when the workers are off work so they do not lose wages in order to attend the programs. The two most used program formats are the short course and the conference.

The short course is a program that usually runs 1 night a week, 2-3 hours a night for 5-10 weeks. If the workers live near the university or college labor education center, the program may be held on campus. Many trade union locals have large conference or meeting rooms where the program may be offered.

If the short course is taught off campus, the university labor educators take the program to the workers' home community and put it on in a local college, high school, government building, court house, utility, or union classroom. If university labor educators, whether faculty or professional, are to

teach, they will travel each week to the class location. If labor educators do not teach, they will usually open the class, register the students, pass out class workbooks or kits, and introduce the instructor, who may be from the local community, or from the university.

Conferences usually range in length from 1 day to 2 weeks. Like the short course, the conference is put together through the joint planning process. In the cosponsored short course, once the topic, fee, location, time, and date are determined, the university takes charge. In a conference, the joint planning process is much more complex. It may involve a local union and the international union's education director, subject matter specialists, and conference center or hotel conference and banquet personnel, along with the labor educator(s) in charge of development. The university may assume the entire responsibility of coordination, or it may divide it with the cosponsoring union organization. Negotiation about division of labor extends to program content, costs and fees, instructor conference materials, introduction of instructors, and the graduation ceremony. In some cases, the union will insist that its staff teach a certain topic because of the union's policy involvement or upcoming negotiations.

In States with university programs, the State AFL-CIO central body may cosponsor a week-long summer school at the university that is open to all AFL-CIO affiliates within the State. These schools may range from 30 participants to well over 100. The topics may be newly selected each year or the school may have basic and advanced sections of topics as well as new topics. These programs may make use of leadership manuals that are produced each year by the National AFL-CIO primarily on political, legislative, or economic matters. In addition, the State AFL-CIO will have a number of legislative, topics, such as worker's compensation and unemployment insurance, or perhaps a session on State tax or safety laws that concern unionists within the State. It is not uncommon to have State officials who are responsible for administering laws in specific areas to be present to explain them. In States without university labor programs, such as Virginia, the national AFL-CIO might supply assistance to State AFL-CIO officers who may hold 2- or 3-day weekend conferences. In addition, several State AFL-CIO organizations may band together to run a regional summer school.

An example of a successful summer school program is one sponsored jointly by the AFL-CIO and the Women's Subcommittee of the University and College Labor Education Association (UCLEA). The schools, designed for rank and file women union members, are held annually in four regions of the country and have been attended by over 400 women annually for the past 10-12 years.

Again, these programs depend to a major extent on the AFL-CIO Education Department for expertise, class materials, films, and assistance in obtaining instructors from the AFL-CIO and elsewhere. In addition to the State AFL-CIO, many National and international unions (the latter representing workers in Canada as well as the United States) often use university facilities for their own regional summer schools. These schools are often operated directly by the international union's education department, which may do the vast majority of the teaching. The international union may, on the other hand, turn over the

summer school to the university labor educators to develop and teach, although the topic areas will be negotiated with the union.

The conferences, whether university or union administered, will usually be of two types. The first type of conference is designed to disseminate general information that will assist participants in understanding new issues or changes in law, bargaining, foreign trade impacts, and so forth, so they can better carry out their functions. The second type of conference may be on a single topic or related topics that will provide needed expertise, in-depth knowledge, or problem-solving assistance. The latter tends to be designed for the current or potential union leadership.

The suppliers of labor education within the union vary considerably from union to union and often from region to region. Unions with their own staff of labor educators design programs on a regional basis to be held near the area with the greatest concentration of members. This is necessary to ensure attendance and to minimize the cost of transportation. The latter cost is the second highest cost to the union, with loss of work time being first. In making a determination of educational costs, the international union must consider the costs of transportation and the loss of work time by its members along with the cost of the program itself.

Because trade unions cannot use educational expenses as tax write-offs, the cost of education to a trade union is often greater than it is for a business. This means that unions must weigh very carefully their costs and compare them to the priorities noted earlier. This may be one of the major reasons why so many of the small- and medium-size international unions are without full-time educational staffs of their own.

The educational function of unions is further hampered by the passage of complicated laws that affect union government and the workplace. These laws require union compliance such as with the Employees Retirement Income Security Act (ERISA), although no funds are supplied to assist unions in educating their members about the law. When other major pieces of National legislation, such as the Equal Employment Opportunity Act, the Occupational Safety and Health Act (OSHA), and other legislation that affects collective bargaining and the workplace, are considered, it is clear that (with the exception of very few National unions) it will take local union officers and members several years to become familiar with the new legislation. This author estimates that it takes National trade unions from 3 to 5 years after major legislation is passed by Congress to reach their members, who are often scattered in hundreds of small locals throughout the United States. This is unfortunate for the workers, many of whom are not fully aware of their rights and legal protections.

In the trade union, almost all levels of personnel will attempt to involve themselves in the educational process. The suppliers of information within the unions include the following:

- o AFL-CIO Department of Education. This department supplies technical assistance to National and international unions, State and local central bodies, and university and college labor centers that work with trade

unions. It also prepares educational materials, films; provides speakers (through its speakers bureau); teaches in union programs in areas of staff expertise; and develops testimony and testifies before Congress.

- o George Meany Center for Labor Studies. This is a National trade union residential training center whose professional staff prepares programs that are open to all AFL-CIO affiliates, who may send their staff for training free of educational charges. The unions must pay the room and board charges.

The Meany Center publishes an annual catalog of courses that run from 3 days to 2 weeks on topics such as staff training, collective bargaining, arbitration, labor law, use of computers, women's programs, economics, cost of health care, organizing, and so forth. In addition, international unions use center facilities (on a space-available basis) to hold their own conferences and training programs.

The center also has a bachelor's degree in labor studies that union members throughout the United States may take through Antioch College. The center uses tutors, weekend conferences, and an atypical, but highly successful, delivery system. The center considers itself to be an adult education center. It operates Wednesday evening cultural programs for the local community and has special showings of art and sculpture.

The center is also the base for the AFL-CIO's American Institute for Free Labor Development (AIFLD), which trains Latin American labor leaders who come to the United States for approximately 8-10 weeks.

- o International unions. These organizations vary in their educational activity, with about 25 percent of them having some form of ongoing labor education programming. International unions such as the United Auto Workers, Steel Workers, Machinists, United Food and Commercial Workers, and Seafarers have their own residential centers for staff training.

THE ROLE OF POSTSECONDARY AND HIGHER EDUCATION IN TRADE UNION EDUCATION AND TRAINING PROGRAMS

The Role of Universities and Colleges in Labor Education and Studies

Today, 95 percent of the labor education conducted in the United States is provided by trade union organizations and by universities and colleges. The breakdown by providers is as follows: 70 percent is offered by universities and colleges, either alone or in cosponsorship with trade union organizations, and 25 percent is offered by union organizations. Although international or local unions, the AFL-CIO, and State and local central bodies all provide labor education programs, only 40-45 of the approximately 185 National and international unions in the United States and Canada can be characterized as having ongoing and continuous labor education programs.* The remaining 5 percent of labor education is supplied by miscellaneous groups such as Catholic labor schools, the U.S. Department of Labor, and the Federal Mediation and Conciliation Service. The latter two organizations occasionally provide training programs that are open both to organized labor and to management.

Prior to the 1930s and 1940s, a few State universities and land grant colleges, in fulfilling their commitment to public service, attempted to meet the education and training needs of labor organizations. The oldest university program in continuous existence is at the University of Wisconsin, whose School for Workers began in 1926. Today, 40 public universities and colleges in 28 States, plus 3 private universities (Georgetown, Harvard, and Roosevelt), have developed either noncredit or credit and degree programs in labor education (University and College Labor Education Association 1983).

Research indicates that university labor education has developed in three stages.** The first stage, which lasted until the post-World War II era, was labor education as a form of adult and continuing education. During this formative period, universities and unions learned to work together as institutions. Labor education programs or units established a separate continuing education delivery system, staffed by professional labor educators using adult education methodologies. They made use of their knowledge of union organization, labor laws, and collective bargaining, as well as labor's roles in the community, State, and Nation, to implement programs of use to unions.

*This estimate is based on author's personal knowledge.

**The three stages are based on the author's unpublished research as well as the knowledge he acquired while serving two terms as president of the University and College Labor Education Association from 1971 through 1975.

During this formative period, unions and universities learned to work together by developing special relationships that protected the institutional integrity of both organizations. Included were the establishment of labor advisory committees composed of top-level labor leaders who represented a broad spectrum of labor organizations. Joint planning was used in developing programs. This permitted the workers and their leaders to have a voice in the entire process from planning and development to evaluation. Workers and their organizations, in turn, recognized that the universities needed academic freedom, understanding that classroom topics would be viewed from several perspectives.

Both unions and universities learned that, in order to have effective programs, there had to be a recognized place on campus that the workers and their leaders could locate with ease and that could coordinate their educational program needs. This was much more important in the beginning of labor education, as the vast majority of workers and their leaders from the 1920s until well into the 1960s were not familiar with universities.

During the formative period, labor education's method of delivery was closest to the cooperative extension service model. Labor educators would leave the university and go throughout their States to plan programs with the union organizations. They would return to the university to develop course materials, often selecting instructors from among the faculty who could teach topics effectively to adults, and then take the completed program to the workers' communities. These early programs also provided research services to union organizations. Examples of early programs were those located at Rutgers and Pennsylvania State Universities.

After World War II, the second phase of university labor education emerged from the creation of industrial relations programs. These were often developed at major universities, such as Cornell, Michigan State, and the Universities of California, Illinois, and Minnesota, to meet the need for education in the new professional field of industrial relations. These industrial relations programs sprang up in the aftermath of the passage of the National Labor Relations Act in 1935 and from the experiences gained under the War Labor Board during World War II. They were influenced by the concept that labor and management relations could be more harmonious if parties understood the new system. Although industrial relations programs were primarily designed to educate professionals in the newly developing field or to train potential business leaders in industrial relations, some educators determined that ways had to be found to educate union leaders, personnel, and other managers who were not going to enroll in the new graduate courses or programs. These centers often developed noncredit training programs staffed by faculty and other professionals who worked with existing union and management organizations. The industrial relations centers, institutes, or schools often provided specialized faculties for each of the programs--the degree program, the labor education program, and the management personnel program. Today, each faculty or unit of professionals may perform research, do credit and noncredit teaching, or be separated into specialized research units.

The labor education programs within the industrial relations centers carried forth the same methods of working with union organizations as did the

earlier continuing-education-based programs. The need for freedom to meet the unions' vast variety of program payment methods, for example, was the same within the industrial relations centers as within the colleges of continuing education. This need required a large measure of independence within the industrial relations center for their labor education program delivery wing.

The third phase of the development of labor education is tied, in part, to the formal recognition by universities that there is a body of interdisciplinary knowledge that surrounds the trade unions and their functions, both within the United States and abroad. Trade union labor education has both benefitted and suffered as a result of the disciplines that have provided much of the knowledge about union organizations and their functions: labor economics, labor history, and (more recently) interdisciplinary industrial relations. Yet, organized labor's major political and legislative roles have been of little concern to the fields of political science, sociology, and psychology (except as they relate to work), and its international role has been considered on a hit-or-miss basis. Nor have the internal functions of trade unions been examined from personnel or management perspectives. This is not to say that organized labor would have always welcomed this interest. Presently, however, the barrier to internal research and external review and use of consultants is rapidly breaking down as more and more university-trained officers assume the leadership of unions through the electoral process and as more staff are college educated and trained. Labor studies programs are not only able to carry on the work of the past, but are also able to make use of disciplines that have not usually been associated with the study of trade unions.

During the third phase, universities have begun to develop credit programs in labor studies. These programs tend to be broader than programs in industrial relations, but there is not a definitive division between the two. Labor studies programs continue to utilize industrial and labor relations courses as part of their standard offerings. Although it includes labor management relations, labor studies is concerned with the internal activities of unions as well as their external activities.

The opportunity to offer degree programs in labor studies has increased the number of universities involved in labor education programs. No longer are labor studies programs the domain of departments of continuing education or industrial relations. University or college degree programs in labor studies are most frequently located within schools of business or education. Major growth in this area began in the late 1960s and continued throughout the 1970s.

Some individuals question how well labor studies programs have been assimilated into the university during this third phase. One study (Nash 1978) views the university labor educator as a semiprofessional who acts as a bridge between the worlds of higher education and organized labor but is not fully accepted in either. According to Nash, "The future of labor educators is linked with future relationships between organized labor and the university" (p. 55). Nash explains that there will be greater need for mutual cooperation between organized labor and universities as labor unions will depend on universities to provide educational programs that will "train union activists in organizational analysis and use of critical judgment" (ibid.). Universities,

however, must become more responsive to the educational needs of union members in order to serve this population successfully.

Labor education and labor studies have continued to grow in the late 1970s and the early 1980s, despite National and regional economic downturns, university cutbacks, and reductions in other disciplinary areas. Today, 47 university and college programs belong to the University and College Labor Education Association (UCLEA). With the exception of a few programs that were threatened by university reductions, labor studies programs have expanded during the past decade as follows:

- o The total number of universities and colleges offering programs has increased.
- o Existing programs have expanded to include satellite centers or the development of close working relationships with community colleges.
- o The number and level of degree programs have increased.

This expansion has taken place in one of the following ways:

- o An existing program was expanded.
- o Credit and noncredit programs were initiated concurrently, as in the case of the University of Massachusetts-Amherst.
- o Programs were developed exclusively as degree programs, as in the case of Empire State College in New York City (State University of New York) and at community colleges.
- o An existing degree program in industrial relations has broadened its base to include labor studies, as in the case of Pennsylvania State University.

The degree programs are new and still changing based on many factors. Faculty experiences, outside professional evaluations, the changing educational needs of organized labor, interdisciplinary interests in labor studies within the university, world developments that affect union organizations and their worldwide interests and activities, and the constant and continuing impact of science, technology, and communication revolutions all influence degree programs in labor studies.

The new university and college labor studies programs have begun to perform research on the union and its functions. The graduates of these programs are finding employment with local, National, or international trade union organizations, as well as with organizations such as Government agencies that must work with trade unions. Unions, like other institutional organizations in society, need personnel who can carry out the institution's changing functions and who have enough general background to meet future challenges.

Although there is sufficient available information to begin to develop a qualified estimate of the educational background required for most elected

positions within labor unions, no estimate has been made. One reason for not assessing educational requirements may result from the fact that trade unions elect their leaders through open, secret ballot elections; therefore, an individual's political skills often take precedence over other qualifications, such as educational background. Through the years, however, workers for the most part have selected their leadership wisely, and once in office, many union leaders have turned to labor studies centers to assist them in their education and development.

Universities and colleges with labor education and studies programs have been expanding and developing both their credit and noncredit educational offerings. They appear to be meeting the needs of local and State bodies better than those of the National organizations. This situation may change as labor studies programs develop and expand beyond strict industrial relations and local union concerns into the many new areas that face national union leadership.

Without adequate research on their education and training needs, educational programs will continue to progress on a hit-or-miss basis. In all probability, it will take much longer for universities and colleges, the George Meany Center, and international unions to determine what educational background is needed to educate and train union officers (and particularly their professional staff). Meeting the educational training needs of union staff at the National and international level is increasingly important. Attempts should be made to improve education and training so that union professionals, whether elected or appointed, will have sufficient background to carry out their complex job functions both now and in the future.

The Community College Role in Labor Education and Studies

The development of community colleges in the United States in the 1960s dramatically expanded educational opportunity for workers, especially those who were union members. Community colleges that were established in major U.S. counties and cities brought low-cost education close to workers' homes and workplaces. The community college's often nontraditional educational offerings and its outreach within the community brought together the colleges and the union organizations in the geographic area.

Initially, it was often difficult for community colleges to work with unions in the field of labor education. The first problem was that the community colleges did not have labor education specialists who knew the union as an institution and, therefore, how to work constructively with it. Secondly, they often did not have the necessary disciplines to provide faculty for labor education programs. Finally, the community colleges that were established in major industrial States found the "turf" already staked out by the entrenched State university labor education program--with the full support of the trade unions.

With the field of labor education partially closed, the community colleges, encouraged by trade unions, turned their attention to the development of labor studies associate's degree programs. These programs provided a

variety of educational packages, but most included introductory courses in such areas as labor and industrial relations, labor law, labor relations and bargaining, union communications, parliamentary procedure, union administration and contract administration, union history, and unions and the community.*

The degree programs often reflected the primary trade union interests. The development of the courses and degrees by the community colleges reflected the union and work force mix of their region or the State (e.g., industrial, mining, construction, transportation, or government center or installation). The degree programs had two difficulties--quality of instruction available and lack of texts and supporting library materials in the subject areas. This situation has generally improved due to unions' support of college budget increases and due to the growing experience of colleges in working with unions.

As one example, the AFL-CIO George Meany Center for Labor Studies, with the assistance of grant funds, commissioned seven texts that are being written by labor educators and that will be published by the Bureau of National Affairs (BNA). The project also developed pilot programs that brought together building and construction trade unions and community colleges to provide academic credit awards for apprenticeship training completed. Through this project, the Meany Center worked with four community colleges to develop associate's degrees that would consist of approximately one-third labor studies, one-third additional requirements, and one-third apprentice training as provided by the unions and the construction contractors. Probably for the first time at the community colleges, this project combined the labor studies degree with academic credit for apprenticeship.

Previously, technically oriented community colleges had developed credit awards for apprenticeship education programs and other forms of skilled training based on the number of years of apprenticeship completed, the type of apprenticeship, the skill level required, and the classroom content. The credits varied by union organization, with those unions in the mechanical trades--electricians, plumbers, pipe fitters, sheet metal workers, and operating engineers--involving some of the highest amounts of credit, since programs for these trades tend to require more math and science. Community colleges continuously evaluate the apprenticeship programs that they have developed jointly with unions. Despite the fact that apprenticeship programs are National in scope, however, the credit offered by community colleges has often been ad hoc in nature and has differed from institution to institution. The Meany Center project may have resulted in more uniform criteria for credit awards for apprenticeship programs in the construction trades.

Relationships between the building and construction trade unions, their contractors, and community colleges that have developed as a result of the Meany Center project will continue to grow. Because the construction industry

*The author acquired his knowledge about community college labor education programs when he served as a member of the Labor Education Advisory Committee of the American Association of Community and Junior Colleges.

was particularly hard hit by recent economic conditions, there may be a temporary decline in the number of apprentices trained. However, it would seem that now would be the time for journeyworkers who have completed their apprenticeship to further their education; unions and contractors in the construction industry must continually upgrade the skills of their present journeyworkers as science and technology continue to advance.

Whether or not community colleges are playing a role in the continuing education of the construction craftworker is not known, as no major study has delineated the current relationship between the community colleges and the construction trade unions. Yet, the interest among certain AFL-CIO international unions such as the International Brotherhood of Electrical Workers (IBEW) and the International Union of Operating Engineers (IUOE) will continue to assist their locals in building continuing relationships with the colleges.

The community college is in a position to assist in the process of training and educating workers and their union leaders due to their geographic locations throughout the State, due to flexibility in programming to meet community needs, and due to the fact that they offer both academic and vocational curricula. These factors should permit the union members to begin or continue their education near home and to maintain their livelihood at the same time. They should also permit union members to find courses that will help them better understand their union, its functions, the laws that govern it and the workplace, and the political and legislative issues facing it, as well as prepare them to play a more constructive role in their organization and their communities.

Because most community colleges provide technical training, they are in a position to develop apprenticeship programs similar to those developed through the Meany Center project as well as provide other types of vocational training that will benefit workers. Education of the work force is one area where unions and management can cooperate to receive mutual benefits. The unions want to assist workers by providing a means to upgrade skills and increase job security and eligibility for promotion. Employers desire to upgrade the work force to improve productivity. Community colleges can assist both unions and employers with their concerns. For example, the United Auto Workers (UAW) has negotiated an educational fringe benefit for its members. Under this agreement General Motors allows each of its UAW employees \$1,000 a year for education and training. Such programs have been a major force in certain areas of the country, particularly for community colleges.

TUITION AID PROGRAMS: A NEGOTIATED BENEFIT FOR WORKERS' EDUCATION

Introduction

The financing of education and training programs that benefit members of labor unions takes place in a number of diverse ways. Unions generally support the education and training of their members through one or more of the following methods.

- o They support legislation at the local, State, and Federal levels that is designed to provide equitable, affordable educational opportunities for American adults.
- o They subsidize members directly through union financial loan and scholarship programs.
- o They contract directly with educational institutions to provide specific courses for their members.
- o They develop internal education and training programs through their education departments.
- o They use collective bargaining to negotiate contracts that provide educational benefits to their members (Smith 1982).

Of the five methods listed, the negotiated benefit is the one that provides the greatest number of educational opportunities for union members. Unfortunately, not much is known about negotiated education and training benefits since the topic has not been studied in any systematic, detailed manner. According to the available research, however, there are three major forms of negotiated education benefits:

- o Apprenticeship programs
- o On-the-job training plans
- o Tuition aid plans (ibid.)

Since tuition aid plans provide workers with a means of enrolling in courses at educational institutions, they are of particular interest to vocational and adult educators.

Background

Although tuition aid programs have existed since the early 1900s, only recently has the practice become prevalent enough to attract serious attention. During 1976-80, the National Institute for Work and Learning (NIWL) conducted a thorough study of tuition aid programs to determine the extent of utilization of the programs and to identify barriers that tend to reduce workers' use of this benefit. According to the study, which was sponsored by the National Institute of Education, in 1977 there were an estimated 198 major contracts with tuition aid benefits covering approximately 1.6-2.0 million workers. However, the utilization rate of the plans was low, particularly among blue-collar workers. Although there were plans in all industrial sectors, they were distributed unevenly. Of the plans examined, 54 percent were in manufacturing, 19 percent in services, 18 percent in transportation and utilities, and 9 percent in construction. This variation can be explained in part by rate of unionization of different industries (Charner et al. 1978; Smith 1982).

Types of Tuition Aid Plans

According to NIWL researchers, a negotiated tuition aid plan is "any formal plan in which a company has agreed, within the terms of a company-union contract, to give employers financial aid to pursue courses offered on or off company and union premises" (Charner et al. 1978, p. 27). The following four types of negotiated education benefits were identified:

- o Tuition advancement or reimbursement plans
- o Educational leave and leave-of-absence plans
- o Training fund plans
- o Scholarship and educational loan plans

Although normally only one of the four types of tuition aid plans appeared in a negotiated agreement, in a number of instances two or more types were found (ibid.). These four types are described in more detail below.

Tuition Advancement or Reimbursement Plans

Tuition advancement or reimbursement plans pay all or part of the tuition expenses incurred by eligible individuals who enroll in education and training programs sponsored by an institution other than the employer. These plans may also cover other expenses, including registration fees, student activities, laboratory fees, graduation expenses, and books (Charner et al. 1978; Smith 1982).

Most plans are of the reimbursement type, in which the employee only receives reimbursement from the employer after satisfactory completion of the course. Of the plans examined in the NIWL study, 90 percent had tuition

reimbursement as a benefit. Tuition advancement plans, those in which the money is paid either to the employee or the educational provider prior to course enrollment, were much less common. Only 5 percent of the plans studied by the NIWL staff were of this type (ibid.).

According to Smith (1982), "The diversity one finds in negotiated tuition [advancement or reimbursement] plans certifies that no master strategy was involved in their evolution" (p. 7). A closer examination of the plans and their provisions proves Smith's point.

In most plans, worker eligibility is based on three criteria: job classification, accrued seniority, and satisfactory completion of the course or program. Although most plans permit only active employees to participate, a small number cover laid-off workers who were active at the time of plan enrollment. Only one-third of the plans have seniority requirements and those that do generally require 1 year (or less) of service with the company. Although most plans specify satisfactory course completion in the contract, there is usually no definition of satisfactory given; that is a very small number of plans indicate that a specific grade must be obtained (Charner et al. 1978; Smith 1982).

These plans also frequently specify the types of institutions employees may attend and the kinds of courses they may study. Rather than naming specific institutions, plans use the language "approved" or "accredited institutions." Acceptable courses are listed and plans also state whether they must be taken for credit or related to the individual's job or career. In some cases, plans specify that courses must be related to either a degree or a license (Charner et al. 1978; Smith 1982).

Released time from work is generally not granted to employees who participate in tuition aid programs of this type. They may, however, be given the option of trading shifts or adjusting their work schedules to accommodate their course schedules. Since only 3 percent of the plans studied by NIWL granted time off for study, it is safe to say that tuition aid is assumed to be an "after-hours program" (Charner et al. 1978; Smith 1982).

Tuition advancement and reimbursement plans, although quite common, are diverse in their provisions. It is, therefore, difficult to generalize about them other than to say that they are a part of a large number of contracts and on paper represent a commitment of between \$100 million and \$1 billion to worker education opportunity (Smith 1980).

Educational Leave and Leave-of-Absence Plans

Educational leave and leave-of-absence plans permit the employee time off from work to pursue educational endeavors. Educational leave is granted to a worker for a specified period during working hours, whereas a leave of absence is granted for an extended period of time. Partial or full tuition payment may be a part of either of these plans. Although these plans are common benefits in Canada and western European countries, they are relatively rare in the United States. Only 16 percent of the plans studied by NIWL researchers had

leave-of-absence or educational leave provisions (Charner et al. 1978; Smith 1982).

The eligibility criteria for these plans are similar to those of tuition reimbursement or advancement plans. Most plans specify that leave time should be devoted to study that is career or job related. Although most leave plans are for college-level work, some unions have been successful in negotiating broader educational options. One example of this is an agreement between the United Auto Workers and International Harvester that permits qualified workers to use the leave program to attend elementary or secondary school (Smith 1982).

Most leave-of-absence plans credit the employee with continuous service, an important aspect in terms of pension rights. Also, depending on seniority and job availability, many companies will reinstate workers at the job classification they held prior to taking leave (Charner et al. 1978).

Training Fund Plans

Training fund plans, also known as trust fund plans or education and training programs, are accumulated under agreements in which employees contribute fixed amounts of money per employee into a central fund to be used to finance education and training. These funds are usually administered by a board of trustees composed of both union and company officials. The trustees are responsible for program planning and development; they secure facilities, hire staff, and plan the curriculum. Frequently, a fund is used to establish a training institute or school. Twenty-eight percent of the plans studied by the NIWL had training fund plans, making them the second most frequently negotiated educational benefit (Charner et al. 1978; Smith 1982).

Most training funds have as their objectives to improve employee on-the-job performance, to retrain workers, and to reduce educational costs for employees (Charner et al. 1978; Smith 1982).

Scholarship and Educational Loan Programs

Scholarship and educational loan programs are the smallest in number of the tuition aid programs. Only 6 of the 79 major contracts studied by the NIWL staff had scholarship or loan provisions. Under scholarship programs, eligible employees are given funds to cover direct and related costs of education and training programs. Loan programs make money available to workers on a loan basis; they also include provisions for repaying the loan. Sometimes loan programs are a part of tuition reimbursement programs. In these cases, workers are loaned money for educational programs, but the loan is waived if courses are completed satisfactorily. Loan and scholarship programs are not normally as restrictive as the other plans with respect to courses of study and satisfactory completion, although scholarship programs emphasize the need for program completion (Charner et al. 1978; Smith 1982).

Barriers to Participation

Tuition aid plans--whether negotiated or not--are considered a standard benefit; however, only 4 or 5 percent of workers take advantage of them.* This participation rate seems especially low since the NIWL study established that management, unions, and workers concur that these plans have very important functions. They agree that these plans contribute to improved job performance, personnel development, and job satisfaction (Barton 1982).

According to Smith (1982), low participation rates have nothing to do with low regard for education on the part of workers, since a number of recent studies have concluded that unionized workers place a high value on education. He suggests rather that underutilization of the plans is a result of the following factors:

- o Lack of confidence about ability to succeed in educational settings
- o Lack of information about available benefits
- o Lack of information about educational programs
- o Lack of encouragement
- o Lack of flexible work schedules

Using information obtained from workers, unions, and management, the NIWL staff identified three areas that needed attention in order to improve worker participation rates. Those three areas are as follows:

- o Information delivery. Since companies and unions do very little to publicize tuition aid plans, large groups of workers do not know about their eligibility. Also, workers have inadequate information about educational programs. At a minimum, employees should have information about the nature of tuition aid plans, available education programs, and qualified education and training institutions.
- o Counseling. Inadequate counseling was another barrier to utilization of tuition aid programs. Both career and personal counseling need to be available. Career counseling can assist workers with career planning as well as provide information about appropriate educational offerings. Personal counseling can help them deal with the stresses that may result from returning to school. These include such areas as the feeling of inadequacy and the need to readjust to home and work responsibilities.
- o Improved linkages between the work site and educational providers. Improved linkages can facilitate the delivery of educational and counseling services. Educators need to become knowledgeable about specific

*Tuition aid programs that are not part of negotiated contracts are also not extensively utilized by eligible employees.

provisions of tuition aid programs in order to tailor programs for eligible workers. Employers can assist in this effort by making information about tuition assistance programs readily available. They can also provide on-site space for the delivery of counseling and educational programs (Charner et al. 1978).

Summary

Tuition aid programs are an important negotiated benefit for many union members. If more use is to be made of these plans, barriers to worker participation must be reduced. Increased information, available counseling, and improved linkages will help in this process. Other changes that would also enhance worker participation include the following:

- o Expanding the notion of "job-related" courses and programs
- o Expanding the availability of prepayment plans
- o Developing more flexible work schedules
- o Providing incentives for workers to participate in tuition aid programs
- o Devoting special attention to the needs of women and minorities (ibid., p. 83)

Making Tuition Aid Work for You: An Action Guide for Managers, Labor Officials, Workers and Educators (Rogers and Shore 1980) is a useful publication for those interested in developing or improving tuition aid programs. It addresses concerns of different parties through a question-and-answer format and then discusses plans and their implementation. It also suggests ways to overcome barriers to participation.

UNION-SPONSORED EDUCATION IN ACTION: CASE STUDIES

Education and training programs supported or sponsored by labor unions are diverse and represent efforts on a number of levels to make available educational opportunities for workers. This section describes educational programs that have been made possible through the efforts of labor unions. The case studies presented here are not intended to be comprehensive, but rather were selected to provide an indication of the variety of education programs made possible through the efforts of organized labor.

The Education Fund of District Council 37

The Education Fund of the American Federation of State, County, and Municipal Employees (AFSCME) District Council (DC) 37 is an exemplary model of a labor-sponsored education program. DC 37 of AFSCME, which represents 110,000 members from New York City civil service locals, is a public service union affiliated with the AFL-CIO. In order to meet the educational needs of its occupationally diverse membership, the fund was established in 1971 through an agreement that called for New York City to contribute \$25 per covered employee to a fund that would be used to meet a general set of educational objectives (Denker 1982; Shore 1979).

Because of its complex nature, the fund can only be described here in very general terms. Readers wishing a complete description of the fund's development and operation should consult Education Fund of District Council 37: A Case Study (Shore 1979).

Program Offerings

The fund, which is viewed primarily as a vehicle for enhancing the career development opportunities of its users, has three major types of programs:

- o Basic skills development programs
- o College degree programs
- o Career-related programs

Basic skills development programs. The basic skills development programs of DC 37's Education Fund have several components, including high school equivalency classes, English-as-a-second-language (ESL) training, and a reading improvement program. Instruction to prepare individuals to pass the New York State High School Equivalency Examination is offered on both an individual and small group basis. ESL instruction is specialized instruction available to

union members whose first language is not English. The reading improvement program provides one-to-one tutoring to members with very limited reading abilities. The tutoring is designed to increase their work effectiveness and to prepare them to take promotional civil service tests. Reading improvement program tutors are retired members of DC 37 who have been trained by the Literacy Volunteers of New York City.

... College degree programs. Like the basic skills development program, the college degree programs also have several components. The most extensive is the tuition refund program. Through this program, eligible members attend credit, degree-related classes at local colleges or universities. Although many members choose to attend classes at City University of New York (CUNY), some elect to attend special programs at the DC 37 campuses of either the College of New Rochelle (CNR) or Hofstra University.

The DC 37 campus of CNR is the only fully accredited, union-sponsored college in the country. Since the union contracts directly with the college for the program, it is not officially a part of DC 37's Education Fund. However, many students use educational fund monies to pay their tuition. All classes are held at DC 37's headquarters and students are actively involved in planning courses and seminars. In 1978, there were 767 enrollees in the DC 37 program at CNR. (For a more complete description of this very unusual program, see Taaffee and Litwak 1980).

The DC 37 campus at Hofstra University offers a 4-year program in labor/liberal arts/social services. The purpose of the program is to train leaders who will be able to solve urban problems. Program enrollees must meet criteria established by the Education Fund, Hofstra, and the New York City Department of Personnel. In 1978, there were 70 enrollees in this program (Shore 1979).

Contracted programs are another component of the college program. These include a special college program offered in cooperation with CUNY in which union members take custom-designed courses that provide a "transition" into regular college-level courses. Another contracted program is a labor/liberal arts program for women that is offered in cooperation with Cornell University's School of Industrial and Labor Relations. Through this program, union members may take credit courses in labor studies and communication skills designed to prepare them for further college work as well as to help them develop an understanding of the labor movement.

Career-related programs. Programs related to several specific career areas are offered as a part of DC 37's Education Fund. There is, for example, a fund-sponsored training program in allied health areas that is designed to upgrade health and hospital employees. This program is offered in cooperation with New York City Health and Hospitals Corporation and the New York City Department of Health. A clerical skills program offers courses in shorthand, typing, and other clerical areas for the purpose of skills development and job upgrading. Graduates of the clerical skills program can enter a special program at CUNY to receive a degree in secretarial sciences. There are also career-related programs in nursing and accounting (ibid.).

Factors That Contribute to the Fund's Success

It is estimated that during 1977 nearly 10 percent of the 76,000 employees who were eligible for the Education Fund participated in one of its programs. This figure is considerably higher than the National average of 3-4 percent. Three key elements contribute to the success of the fund.

- o It meets the educational needs of the population eligible for its programs.
- o The education is offered in the context of the union.
- o The fund's program has features that ease the transition of working adults back into the classroom.

Other studies (i.e., Charner et al. 1978) reveal that training programs available to union members have barriers that prohibit workers from participating. The DC 37's Education Fund, however, attempts to reduce barriers to participation in education faced by working adults through the following mechanisms:

- o Flexible, simplified admissions procedures
- o Scheduling arrangements that accommodate work schedules
- o A diversified, nonrestrictive curriculum
- o Little or no out-of-pocket expenses for students
- o An accessible network of support services including widely available group and individual counseling
- o Widespread publicity of the fund and its programs (Shore 1979, p. xiii)

District 1199's Training and Upgrading Fund

Another example of a training fund is the one that Local 1199, National Union of Hospitals and Health Care Employees, has developed for its New York-area members. The union's leadership recognized that educational requirements for health care industry jobs were continually being raised. Therefore, union leaders felt that one way of keeping black and Spanish workers, mostly women, from being located in low-level jobs would be to provide them opportunities for further education. In 1969, the Training and Upgrading Fund was established as a result of collective bargaining between District 1199 and the League of Voluntary Hospitals and Homes of New York. The agreement requires participating institutions to contribute an amount equal to 1 percent of the gross payroll of Local 1199 members to a trust fund that is administered by trustees (Denker 1982; Shtob and Hackney 1980).

Program Offerings

Like DC 37's Education Fund, District 1199 offers a variety of educational programs through its fund. At the most basic level, instruction is remedial, since many thousands of the union's members either lack a high school diploma or need refresher courses to prepare them for further training. To fulfill this need for basic education, the fund has established a school that offers both morning and evening high school equivalency and college preparatory classes. This school serves over 300 of the union's members each year (Shtob and Hackney 1980).

At another level, the fund makes tuition assistance available to District 1199 members for courses that they pursue on their own. Nearly 1,000 members receive aid for a range of health-related studies provided by academic and technical training institutions throughout the city (ibid.).

At a third level, the fund sponsors courses of study at metropolitan-area colleges and teaching hospitals. These are full-time courses of study available to members who meet requirements of both the fund and the teaching institution. Individuals who are admitted to these programs are granted a leave of absence by their employers and receive a stipend from the fund of 85 percent of their net salary for the period in which they are in school. Nearly 300 members participate in these training programs each year (ibid.).

Although District 1199's Training and Upgrading Fund concentrates most of its resources on basic education and training for better jobs, it also sponsored "Bread and Roses." Operated from 1979 to 1981, "Bread and Roses" was a project designed to "celebrate the twentieth anniversary of the union's organizing campaign among low-paid hospital workers" (ibid., p. 36). The program featured musical and dramatic performances and art exhibitions at the union's New York City headquarters and at its 1,600-family cooperative housing development in the city. Professional dramatic, musical, and poetry programs were also presented in institutions where members worked.

Wayne State University's University Studies and Weekend College Program

In 1973, Wayne State University in Detroit began its University Studies and Weekend College Program, an undergraduate bachelor's degree program designed to meet the needs of working adults. Unlike the educational funds discussed in the two previous case studies, the Wayne State program was not developed by a labor union or specifically for labor union members. The university, however, capitalized upon its positive relationships with the city's labor community in planning and implementing the program. Using its ties with labor leaders as an entrée, the program has been able to involve many blue-collar and service workers in higher education. The United Auto Workers (UAW) has been a key factor in the success of the program. The director of education for the UAW and staff members participated actively as the program was developed. They, in turn, involved UAW regional representatives in order to reach out to UAW locals. Many UAW locals have established cooperative relationships with the program and classes are often held at local headquarters.

Finally, the UAW negotiated tuition refund benefits, amounting to \$1,000 per year per union member, allow UAW members to take advantage of the Wayne State program (Denker 1982; Stack and Paskal 1980).

The Curriculum and Its Delivery

Because of the program's unique delivery system, working adults are able to take three 4-credit courses per term. Instruction is delivered in the following ways:

- o Televised presentations. Television courses appear at a variety of times so students can watch them in their homes at their convenience.
- o Once-a-week workshops. Workshop courses using a seminar format meet once a week for 4 hours. They are held at a variety of times and meet in a number of different locations including local union halls, churches, high schools, and libraries.
- o Intensive weekend conferences. Twice each quarter, weekend conference courses meet on the Wayne State campus. These intensive sessions include resources not ordinarily available in more traditional classrooms including films, nationally recognized speakers, and so forth (Stack and Paskal 1980).

Although the delivery system is designed to eliminate barriers of time and distance, it is the curriculum that facilitates successful completion of the degree program. The three courses in which a student enrolls each term are organized around a common theme from one of the following areas--social sciences, humanities, and science and technology. The themes themselves are approached from an interdisciplinary perspective. For example, a student meeting a social science requirement might be studying the topic of work and society in each of three classes. Students are able to complete 36 hours of required lower division coursework through these courses. The remainder of the program consists of 36 hours of electives, 24 hours of upper division theory and method courses, and a 12-credit-hour senior essay (Denker 1982; Stack and Paskal 1980).

Student services have likewise been designed to accommodate the schedules of working adults and to minimize their anxieties about returning to school. For example, the registration process has been streamlined and takes place at a number of convenient locations including local union halls, community centers, and job sites. Student services staff members have likewise learned to function in a number of different roles; they are no longer specialists in one area but rather serve as admissions officers, registrars, and academic advisors (Denker 1982; Stack and Paskal 1980).

Replication of the Wayne State Program

The success of the Wayne State University's University Studies and Weekend College Program led to the establishment of the To Educate the People (TEP)

Consortium. The consortium, the membership of which consists of universities, labor unions, television stations, and adult and labor education centers from across the country, was formed for the purpose of implementing degree programs for working adults, especially those who have not had access to higher education. Through the efforts of the TEP Consortium, the Wayne State model has been adapted by a number of institutions of higher education. Several labor unions are involved in the TEP Consortium, including the Teamsters, AFSCME, the AFL-CIO, and the UAW (Denker 1982; Feinstein 1979).

The American Federation of Teachers has developed its own version of the Wayne State model, known as PACE (Project for Adult College Education). In Kansas City, Missouri, Longview Community College has implemented the PACE model and adults can earn an associate's degree in a five-semester interdisciplinary program. The PACE program at Longview has been supported locally by the Teamsters, the UAW, and Kansas City's Central Labor Council (Denker 1982).

The To Educate the People Consortium is more fully described in publications by McMann (1981), Feinstein and Angelo (1977), and Feinstein (1979), which are available through the ERIC system.

Programs for Dislocated Workers

Throughout the early 1980s, labor unions have been involved in developing programs and services for displaced or laid-off workers. These programs use a variety of approaches such as job search assistance or job development to help workers find new jobs. Because the topic of this paper is labor's involvement in education and training, the programs discussed here were selected because of their emphasis on training.

Steelworker Cross-training Program

In 1982 when the number of layoffs in the U.S. steel industry had reached a crisis in the Pittsburgh, Pennsylvania area, representatives of the United Steel Workers of America and the dean of continuing education at the Community College of Allegheny developed a retraining program for unemployed steelworkers. Working together, they formulated a "job task analysis model" to be used to cross-train steelworkers for new jobs. The model was based on the following premise: former steelworkers were highly skilled and trained in occupations that offered a high potential for transfer of skills to occupations outside the steel industry.

The model consisted of the following steps:

- o Analysis of local labor market changes to identify potential employment opportunities for skilled workers
- o Identification of job categories of unemployed workers with levels of education, duties, tasks, and responsibilities similar to employment opportunities identified through step one

- o Selection and cross-training of candidates from job categories identified in step two

The analysis in step 1 revealed a labor market need in the Pittsburgh area for stationary engineers. Through the step two analysis of job categories, it was determined that the job requirements of a stationary engineer were similar to the millwright's job in the steel mills. The local employment service identified a candidate pool of millwrights who were then referred to the training program at the community college. Thirty unemployed millwrights were selected for an intensive 5-week cross-training program that built upon the prior education and work experience of the trainees. The cross-training program has subsequently been used to prepare other dislocated workers in the areas of electronic repair, instrument repair, and electromechanical repair for emerging jobs as robotic repair technicians (Ashley and Zahniser 1984).

Retraining Program for Laid-off Auto Workers

The AFL-CIO Human Resources Development Institute (HRDI) has been involved in a number of programs to assist displaced workers. One of these, a retraining program, was developed in conjunction with United Auto Workers (UAW), Local 1364 in order to assist auto workers laid off as a result of the sudden closing of a General Motors auto assembly plant in Fremont, California. The closing in Fremont was only one of several plant closings in the Hayward, California community, so competition for available jobs was fierce. As in the case of the Pennsylvania retraining program, however, it was determined that area employers needed persons trained in machine tool skills.

Working in cooperation with the Chabot Community College of Hayward, the UAW and HRDI developed a machine tool retraining program for 24 members of UAW, Local 1364. The classroom training provided by the college consisted of 168 instructional hours delivered over a period of 7 weeks tailored to meet the needs of a local employer who had pledged to hire at least 15 of the 24 trainees. Comprehensive Education and Training Act (CETA) funds administered by the Alameda County Training and Employment Board were used to finance the training; in order to meet CETA Title VII eligibility criteria, therefore, all participants were either "retraining eligible" or economically disadvantaged (Labor-Involved Services for Displaced Workers 1983).

Retraining Program for Laid-off Miners

Another program developed with the assistance of AFL-CIO's Human Resources Development Institute was a program for members of the United Mine Workers (UMW) of America, Local 56 located in Colorado. Cutbacks in the steel industry affected the mining industry since there was reduced demand for an ore used in hardening steel. Therefore, a retraining program was planned to prepare some of the displaced mine workers for reemployment in new, high-demand occupations. In addition to UMW, Local 56, United Steelworkers of America (USWA), Local 8031 and Oil, Chemical, and Atomic Workers International Union, Local 2-24410 were involved in the program.

The HRDI assisted in negotiating a CETA contract so that 32 dislocated miners could be retrained as welder/pipe fitters, machinists, and chemical operators. The training programs, which took place at the Rocky Mountain Energy and Environmental Technology Center near Denver, used skilled craftworkers from USWA, Local 8031 as instructors. Although the program was designed to provide 35 hours of training per week for 26 weeks, the center's open-entry/open-exit system permitted some trainees to complete their training in a shorter time period.

Trainees who completed the program had excellent chances of acquiring skilled jobs at good pay. Not only was the demand high for workers with their newly acquired skills, but also the HRDI and the unions worked with employers to develop jobs. Rockwell International, for example, agreed to hire some of the graduates. Also, the center's placement rate has been consistently high (Labor-Involved Services for Displaced Workers 1983).

Conclusion

The programs discussed in the case studies are indicative of organized labor's interest in ensuring that workers have a variety of educational offerings available to them. Although not necessarily representative of educational programs developed by or in cooperation with organized labor, these programs meet a wide variety of education and training needs.

The education funds, although similar in structure and funding, make available distinctive types of programs. Because it represents an occupationally diverse membership, the Education Fund of District Council 37 provides a full range of programs. District 1199's Training and Upgrading Fund is more limited in scope since its members are all health care professionals.

The Wayne State University's University Studies and Weekend College Program represents yet another type of worker education program. In this case, the program was developed by an educational institution with the cooperation and collaboration of labor unions. Through the efforts of the To Educate the People Consortium, the model has been replicated in a variety of locations throughout the country. In each location, the involvement of organized labor has been a key factor in the program's success.

Finally, the retraining programs for displaced workers are examples of short-term programs developed to meet a need created by changing economic conditions. The three programs discussed here demonstrate that unions enter into a variety of collaborative efforts in order to provide training opportunities for workers.

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